

**TO:** Jim Raporte

**DATE:** October 12, 1992

**FROM:** Jim Mortensen *JM*

**SUBJECT: MARLBORO SUMMER SALE - SECTION 33**

*1.2 47-5306*

### **INTRODUCTION**

This report evaluates Section 33's performance on the Marlboro Summer Sale, a national promotion executed in July and August of 1992. The promotion offered consumers cents off Marlboro single/multi-packs over several weeks, through a PM-retail co-funded price reduction.

Short term objectives of the program included incremental volume, increased visibility through extensive POS, and incremental store traffic/sales. The primary long-term objective was to maintain Marlboro volume and share growth through extended retail-sponsored price promotion.

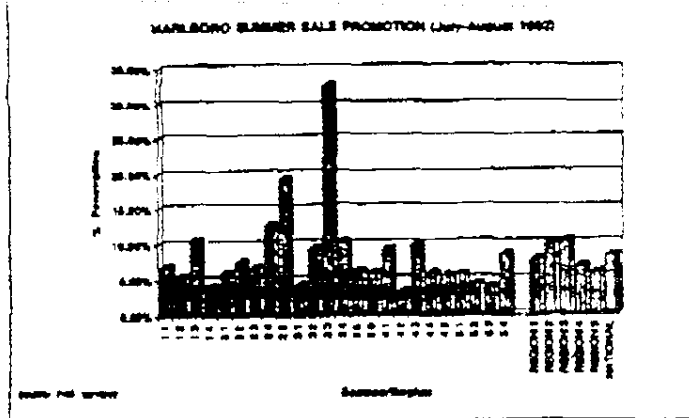
Specific areas reviewed in this report include:

- Penetration
- Execution & Key Findings
- MSA/Nielsen Impact
- Key Account Results
- Summary & Recommendations

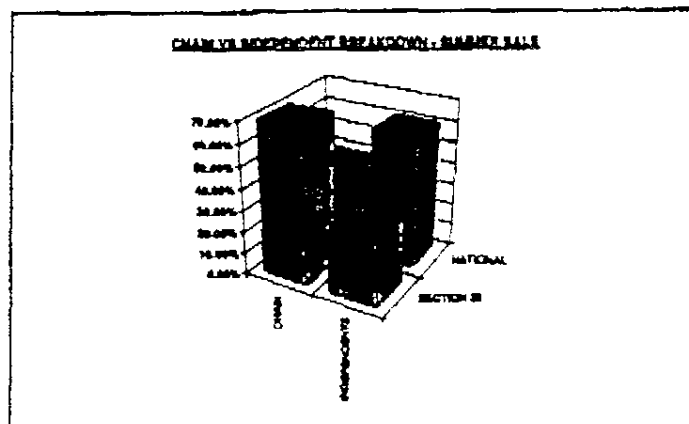
### **PENETRATION & VOLUME COVERAGE**

- According to Penetration Analysis, promotion penetration for the Section was 32.5% (1,877 stores) representing 33% of section volume. National penetration was 8.3% (18,211 stores) representing approximately 9.4% of volume.

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- Based on Sales Rep recaps, an additional 89 stores in the section participated in the event but were not reported, or reported incorrectly. A total of 2,451 stores were paid by Section 33, including 500 stores headquartered in Section 33 but located out-of-section.
- Section 33 penetration skewed toward chain accounts whereas national penetration favored independents.



- Over 83% of the section placements were in convenience stores for a trade-class penetration of 51% (1,566 stores). Nationally, 65% of placements were in convenience stores for a trade-class penetration of 11.7%. (Note: 55% of all stores in Section 33 are chains compared to 49% nationally. Also, 53% of all stores in Section 33 are C-stores compared to 46% nationally).

### EXECUTION & KEY FINDINGS

The program guidelines and budget stifled our ability to serve the promotion objectives listed earlier. The section budget of \$322,156 would have allowed penetration in only 776 stores, based on the worksheet provided by the NYO:

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## MARLBORO 2 PACK WORKSHEET

Marlboro Weekly Pack Volume	51 cpw*
x 4 Weeks	204
x 1.25 (25% Volume Increase)	255
x .65 (65% Sold on Deal)	166
x \$2.50 (Payment)	\$415

$$\$322,156 \div \$415 = 776 \text{ stores}$$

\*Assumes average store volume of 175 cpw and Marlboro SOM = 29% with all sales by the pack.

The above model is fragile for two reasons. First, a 25% projected volume increase proved to be low. We had several retailers co-fund at a level higher than the 10¢ per pack required by the program. This led to much higher volume increases. Even at the minimum level of co-funding, volume increases proved to be higher than 25% in most cases. This issue will be discussed further under "Key Account Results". Second, the worksheet assumes that 65% of product was sold on deal. Although most stores communicated a two-pack deal, they sold 1 pack at a reduced price as well. Retailers are reluctant to isolate single pack buyers and charge a higher price. Additionally, they face financial and operational control issues in isolating multipacks as a special deal.

Recall that the budget would have allowed 776 stores to participate in the program. Given the short and long-term objectives listed earlier, delivery of any of those objectives would be difficult in such a small percentage of stores (23% of Section 33 pack outlets). To deliver the objectives, we decided to focus on chains and negotiate greater co-funding. While this proved effective in gaining broad participation, it led to a considerable budget deficit. Total exposure for the Section will approach \$1.5 million. Chain focus created program demand in the market and also led to downward price pressure across the market. Casey's General Stores, for example, lowered their retail on Marlboro from \$2.26 to \$1.89, through higher co-funding, causing other retailers to match.

## MSA/NIELSEN IMPACT

To adequately assess the programs' impact on shipments, the three month period - June, July, August - needs to be discussed. The attached charts provide a historical record of MSA share of shipments over 16 months for all sections.

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Although the promotion was executed in both July and August, all sections experienced a decrease in Marlboro shipment share for the month of July. This was due to payback from June's inventory maintenance program.

August MSA data is perhaps more revealing:

- Section 33 had the highest increase in Marlboro shipment share, up +3.41 August versus July (chart A).
- Section 33 had the lowest increase in Winston share of shipments, up +0.28 August vs. July, compared to +1.74 nationally (Chart B).
- Section 33 had among the lowest increase in Camel shipment share, up +0.85 August vs. July, compared to +1.36 nationally (Chart C).
- The Total Deep Discount Category had a -0.49 share decrease August vs. July in Section 33, compared to +4.17 nationally (Chart D).

Despite the variability in MSA data month to month, Marlboro's performance in the Section seemed to be positively affected by the promotion during the month of August.

Nielsen data, however, seems to contradict MSA for several reasons:

- Marlboro share of market for August (1MM) was 25.6% in the Section--down -0.59 versus July. Total U.S. was down -0.15 to 23.49.
- Black & White/Generic/Private Label share (1MM Aug '92) was up +1.94 in the Section compared to +1.29 nationally.

It should be noted that the promotion was not featured in any of the Nielsen chains listed as panel stores in the attached list provided by MI&A. This may have diverted smoker traffic from Nielsen stores to competing stores that featured the promotion resulting in a share decline on Marlboro in the panel stores.

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	<u>SECTION 33</u>		<u>TOTAL U.S.</u>	
	<u>SOM</u>	<u>Chg. vs.</u>	<u>SOM</u>	<u>Chg. vs.</u>
	<u>AUG 1MM</u>	<u>July 1MM</u>	<u>Aug 1MM</u>	<u>July 1MM</u>
Marlboro	25.6	(0.6)	23.5	(0.1)
Winston	5.5	(1.0)	6.6	(0.2)
Camel	5.6	(0.0)	4.3	(0.0)
Blk &Wht/PL	19.1	1.9	14.4	1.3

Source: RS New Nielsen

- Note Winston's 1 point share decline. RJR reacted to the Marlboro Summer Sale and featured 70¢ off 2 packs in the Section during September.

### KEY ACCOUNT RESULTS

Each Unit Manager was required to track pre-post results for two accounts participating in the promotion. Results are presented in CHART F. Admittedly, our data collection technique was somewhat crude. In most cases we obtained store shipment/order reports. There are, however, several interesting findings:

- The data reveals sales increases well above the 25% projection. Where post-promotion data is provided, Marlboro experienced shipment levels at our above the pre-promotion levels. The high level of post-promotion shipments indicate that retailers did not forward-buy deal product.
- The two pack promotion generally delivered better results than single pack although there is wide variation.
- Store customer count data collected at Stop & Go (Newton, IA) showed an increase in traffic of +12 customers per day during the four week promotion. The four week period following the promotion shows a sustained traffic increase of +4 per day.
- Outdoor POS was the critical factor in generating incremental traffic and in causing downward pressure on retail prices in the market.
- Retailers increased price to pre-promotion retails following promotion.

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- Accounts are anxious to participate in future co-funded promotions.

## **SUMMARY & RECOMMENDATIONS**

Our experience and findings indicate that co-funded price promotion is very effective in increasing volume over the promotional timeframe. Additional research needs to be conducted to better measure and understand post-promotion volume although our findings suggest a positive influence.

Selling efforts directed initially at chain pack accounts provides leadership in the market that serves both as a participation catalyst and as a pricing benchmark.

Strict adherence to budget forces selling efforts towards independents.

Exterior POS serves a vital role in drawing traffic and influencing market price.

Co-funded price promotion is well understood and accepted by the trade. On going retail-sponsored price reductions are unusual although we are crafting several key account plans that cite this promotion as evidence that price leadership delivers store traffic.

Future co-funded price promotions should include the following:

- Realistic budgets that provide for broader market penetration, especially in chains.
- Revised planning assumptions that are sensitized to variable levels of account co-funding.
- Greater quantities of exterior POS.

Finally, more extensive market research needs to be conducted to help validate our findings.

JM/cp

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CEAAVED1 WMO

SECTION 34	25.63	20.84	24.23	27.05	21.04	22.68	24.18	21.10	26.60	24.25	27.05	26.31	27.38	18.42	22.05	SECTION 33
SECTION 35	22.00	22.38	20.85	20.28	23.51	20.85	20.28	20.28	20.85	20.28	20.85	20.28	20.85	20.28	20.85	SECTION 32
SECTION 36	31.00	30.83	28.88	38.18	28.81	23.45	30.04	28.83	35.56	28.83	23.45	30.04	28.83	35.56	28.83	SECTION 31
SECTION 41	27.88	22.38	28.54	29.28	28.54	20.28	23.51	20.85	20.28	23.51	20.85	20.28	23.51	20.85	20.28	SECTION 30
SECTION 42	25.44	18.38	23.74	27.22	18.01	20.02	25.46	17.42	26.43	23.58	15.58	11.98	16.05	15.17	25.44	SECTION 29
SECTION 43	25.44	20.07	23.20	25.18	18.73	20.58	23.87	17.82	27.38	22.60	12.97	15.17	25.44	20.07	23.20	SECTION 28
SECTION 44	27.87	23.85	28.28	23.32	17.88	25.74	18.08	28.47	26.87	24.07	10.82	14.70	26.58	18.88	24.81	SECTION 27
SECTION 45	26.25	21.88	25.81	27.10	23.38	26.90	28.78	28.41	21.87	18.72	18.88	17.37	26.48	19.28	23.85	SECTION 26
SECTION 51	20.10	18.88	28.08	30.34	18.85	22.78	28.18	38.41	27.22	28.88	25.57	18.81	38.78	18.88	28.75	SECTION 25
SECTION 52	38.88	22.43	28.54	38.74	38.17	38.93	28.11	38.30	28.88	28.88	25.57	18.81	38.78	18.88	28.75	SECTION 24
SECTION 53	38.88	22.43	28.54	38.74	38.17	38.93	28.11	38.30	28.88	28.88	25.57	18.81	38.78	18.88	28.75	SECTION 23
SECTION 54	38.88	22.43	28.54	38.74	38.17	38.93	28.11	38.30	28.88	28.88	25.57	18.81	38.78	18.88	28.75	SECTION 22
TOT UNITED STATES	28.07	22.08	28.83	30.10	22.84	24.18	27.88	30.21	25.48	17.53	18.88	20.44	17.82	20.44	17.82	TOT
REGION 1	31.53	28.88	28.54	32.58	28.18	27.82	31.50	28.11	28.88	20.42	23.11	31.73	21.72	28.88	32.58	REGION 10
REGION 2	27.10	18.27	25.38	28.47	23.15	28.78	27.81	27.81	24.84	15.38	17.15	28.88	15.81	22.38	31.54	REGION 9
REGION 3	28.78	22.21	24.40	28.14	21.38	21.28	28.14	21.38	28.14	21.38	21.38	28.14	21.38	28.14	21.38	REGION 8
REGION 4	28.88	21.43	28.57	18.88	20.38	24.78	18.88	20.38	24.78	18.88	20.38	24.78	18.88	20.38	24.78	REGION 7
REGION 5	34.82	22.88	31.08	35.51	28.74	28.53	30.34	27.88	30.34	27.88	30.34	27.88	30.34	27.88	30.34	REGION 6
SECTION 11	32.83	28.83	31.38	34.88	27.88	28.41	31.51	28.30	31.21	28.43	23.55	32.22	27.45	28.88	32.95	SECTION 21
SECTION 12	30.68	23.83	27.88	32.27	25.01	24.88	28.20	23.71	31.88	27.88	17.53	18.88	28.41	31.88	27.45	SECTION 20
SECTION 13	32.37	33.14	30.88	33.14	28.47	30.28	30.47	27.88	34.47	28.48	22.60	25.83	34.77	30.44	32.81	SECTION 19
SECTION 14	31.31	21.75	28.20	28.81	28.07	30.82	22.58	31.87	27.28	17.87	22.78	30.85	21.38	28.23	33.44	SECTION 18
SECTION 21	28.58	21.85	27.47	28.31	28.31	30.87	22.84	28.88	23.55	21.03	24.28	31.83	15.84	27.74	35.78	SECTION 17
SECTION 22	24.13	15.43	22.88	23.82	20.84	18.88	23.45	18.88	23.45	18.88	15.10	18.88	21.83	20.83	25.71	SECTION 16
SECTION 23	28.82	18.35	24.05	28.13	18.88	18.85	24.88	20.18	28.88	18.88	12.10	18.88	18.88	18.88	28.14	SECTION 15
SECTION 24	25.58	17.58	27.87	18.88	18.88	18.88	24.88	20.18	28.88	18.88	12.10	18.88	18.88	18.88	28.14	SECTION 14
SECTION 25	31.14	23.45	28.81	32.85	28.01	31.83	27.24	33.14	30.81	18.88	18.88	31.28	24.28	38.18	38.18	SECTION 13
SECTION 31	22.84	18.88	21.27	17.78	17.78	17.78	27.54	25.78	18.88	8.88	11.88	22.42	14.57	18.27	26.52	SECTION 12
SECTION 32	22.15	17.88	21.28	28.78	20.81	18.85	18.74	24.78	23.18	15.88	15.08	23.88	15.57	20.13	28.58	SECTION 11
SECTION 33	24.15	17.88	21.28	28.78	20.81	18.85	18.74	24.78	23.18	15.88	15.08	23.88	15.57	20.13	28.58	SECTION 10
SECTION 34	25.63	20.84	24.23	27.05	21.04	22.68	24.18	21.10	26.60	24.25	27.05	26.31	27.38	18.42	22.05	SECTION 9
SECTION 35	22.00	22.38	20.85	20.28	23.51	20.85	20.28	20.28	20.85	20.28	23.51	20.85	20.28	23.51	20.85	SECTION 8
SECTION 36	31.00	30.83	28.88	38.18	28.81	23.45	30.04	28.83	35.56	28.83	23.45	30.04	28.83	35.56	28.83	SECTION 7
SECTION 41	27.88	22.38	28.54	29.28	28.54	20.28	23.51	20.85	20.28	23.51	20.85	20.28	23.51	20.85	20.28	SECTION 6
SECTION 42	25.44	18.38	23.74	27.22	18.01	20.02	25.46	17.42	26.43	23.58	15.58	11.98	16.05	15.17	25.44	SECTION 5
SECTION 43	25.44	20.07	23.20	25.18	18.73	20.58	23.87	17.82	27.38	22.60	12.97	15.17	25.44	20.07	23.20	SECTION 4
SECTION 44	27.87	23.85	28.28	23.32	17.88	25.74	18.08	28.47	26.87	24.07	10.82	14.70	26.58	18.88	24.81	SECTION 3
SECTION 45	26.25	21.88	25.81	27.10	23.38	26.90	28.78	28.41	21.87	18.72	18.88	17.37	26.48	19.28	23.85	SECTION 2
SECTION 51	20.10	18.88	28.08	30.34	18.85	22.78	28.18	38.41	27.22	28.88	25.57	18.81	38.78	18.88	28.75	SECTION 1
SECTION 52	38.88	22.43	28.54	38.74	38.17	38.93	28.11	38.30	28.88	28.88	25.57	18.81	38.78	18.88	28.75	SECTION 0
SECTION 53	38.88	22.43	28.54	38.74	38.17	38.93	28.11	38.30	28.88	28.88	25.57	18.81	38.78	18.88	28.75	SECTION -1
SECTION 54	38.88	22.43	28.54	38.74	38.17	38.93	28.11	38.30	28.88	28.88	25.57	18.81	38.78	18.88	28.75	SECTION -2

CHARIA: MARLBORO

Brand Comparison  
 15.00 Month Exposure - Month AVAL 1/2/82  
 (Database as of AVAL 1/82)

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CHART C: CAMEL

	TOT CAMEL MAY 1991 1MM	TOT CAMEL APR 1991 1MM	TOT CAMEL MAY 1991 1MM	TOT CAMEL JUN 1991 1MM	TOT CAMEL JUL 1991 1MM	TOT CAMEL AUG 1991 1MM	TOT CAMEL SEP 1991 1MM	TOT CAMEL OCT 1991 1MM	TOT CAMEL NOV 1991 1MM	TOT CAMEL DEC 1991 1MM	TOT CAMEL JAN 1992 1MM	TOT CAMEL FEB 1992 1MM	TOT CAMEL MAR 1992 1MM	TOT CAMEL APR 1992 1MM	TOT CAMEL MAY 1992 1MM	TOT CAMEL JUN 1992 1MM	TOT CAMEL JUL 1992 1MM	TOT CAMEL AUG 1992 1MM	AUGUST VERSUS JULY
	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	MSA VOL SHIP SHR	
TOT UNITED STATE	3.04	4.23	3.99	3.59	4.11	3.87	3.58	3.78	3.48	4.10	4.74	5.53	3.84	4.01	4.18	3.68	3.58	4.04	1.38
REGION 1	2.80	3.24	2.95	2.63	3.24	2.98	2.73	2.83	2.73	3.42	3.48	3.97	2.87	3.79	3.07	3.05	2.82	3.88	1.08
REGION 2	2.89	3.02	2.78	2.37	2.62	2.68	2.41	2.59	2.88	2.70	3.18	3.85	2.77	3.82	2.98	3.52	2.50	3.81	1.10
REGION 3	3.25	3.21	3.27	2.78	3.28	3.22	2.84	2.82	2.83	3.58	3.70	4.82	3.10	3.80	3.43	2.81	2.87	3.82	1.08
REGION 4	3.88	4.27	3.99	3.88	4.50	4.19	3.89	3.79	3.89	4.88	5.20	5.08	4.10	5.49	4.20	3.87	3.87	5.11	1.14
REGION 5	7.11	8.23	7.45	7.18	7.55	8.84	8.53	7.05	5.28	8.91	8.83	10.08	8.72	9.10	7.82	8.45	8.18	9.14	2.18
SECTION 11	3.33	3.83	3.43	3.02	4.13	3.89	3.21	3.18	2.97	4.10	3.84	4.50	3.39	4.33	3.62	3.78	2.72	3.97	1.28
SECTION 12	3.82	4.08	3.87	3.18	3.93	3.84	3.48	4.03	2.88	4.45	4.34	3.50	3.85	4.88	3.88	3.81	3.32	5.25	1.82
SECTION 13	2.84	2.30	2.08	1.93	2.25	2.87	1.82	2.07	2.22	2.31	2.71	2.74	1.87	2.74	2.14	2.02	1.88	2.80	0.81
SECTION 14	2.85	3.29	2.87	2.68	3.20	2.89	2.72	2.88	3.03	3.55	3.52	4.10	2.89	4.05	3.11	3.14	2.87	3.82	0.95
SECTION 21	2.58	3.28	2.80	2.52	2.88	2.85	2.53	2.80	3.80	3.33	2.88	3.48	2.71	4.21	3.22	2.75	2.78	4.00	1.24
SECTION 22	2.52	2.70	2.82	2.28	2.57	2.37	2.27	2.38	3.28	2.48	2.82	3.84	2.82	3.35	2.88	2.55	2.28	3.08	0.80
SECTION 23	2.83	3.26	2.87	2.37	3.41	3.07	2.58	2.87	2.24	2.80	4.18	4.88	2.90	3.71	3.25	2.80	2.40	4.24	1.84
SECTION 24	2.57	2.78	2.80	2.08	2.85	2.38	2.18	2.23	2.82	2.57	2.78	3.22	2.53	3.29	2.34	2.22	1.81	2.64	0.83
SECTION 25	2.80	3.19	2.83	2.54	2.80	2.73	2.42	2.70	2.82	2.72	3.34	4.22	3.81	3.73	3.18	2.78	2.82	3.84	1.01
SECTION 31	2.87	2.89	2.87	2.47	3.42	3.28	2.80	2.53	2.81	2.80	4.81	5.11	2.88	3.81	3.29	2.88	2.70	3.80	1.28
SECTION 32	2.83	2.81	2.72	2.28	2.54	2.50	2.30	2.38	3.09	2.87	2.83	3.88	2.28	2.81	2.40	2.22	2.20	3.15	0.85
SECTION 33	4.23	4.59	4.11	4.20	4.57	4.40	3.78	4.23	4.81	5.12	5.04	5.52	4.57	5.58	4.82	4.28	4.18	5.07	0.85
SECTION 34	3.81	3.81	3.44	3.33	3.78	3.34	3.17	3.20	2.85	5.28	3.58	4.84	3.80	4.22	3.44	3.53	3.08	3.72	0.83
SECTION 35	3.27	3.42	3.49	2.84	3.24	3.03	2.97	2.88	3.28	4.88	3.37	4.78	3.38	4.11	3.54	3.08	3.30	3.78	0.48
SECTION 36	3.21	2.78	3.47	2.37	2.57	3.21	2.55	3.04	1.75	2.44	3.58	8.11	2.82	3.34	3.52	2.42	2.88	4.74	2.07
SECTION 41	4.05	4.78	4.37	3.88	4.78	4.82	4.18	3.88	4.37	5.18	5.59	5.97	4.31	8.02	4.84	4.34	4.22	5.14	0.82
SECTION 42	3.72	4.34	4.12	3.41	4.03	3.80	3.33	3.48	3.45	5.01	4.88	5.05	3.52	5.37	3.98	3.70	3.53	4.58	1.03
SECTION 43	3.80	3.89	3.81	3.25	4.78	3.89	3.53	3.88	3.74	4.31	4.84	5.73	3.81	5.37	4.18	3.78	3.80	5.05	1.15
SECTION 44	3.24	3.34	3.02	3.63	3.78	3.74	2.91	3.15	2.80	3.17	5.88	6.18	3.81	4.84	3.28	2.88	3.28	5.09	1.81
SECTION 45	4.85	5.18	4.88	4.83	5.28	4.98	4.54	4.88	4.18	6.18	6.83	8.72	5.38	8.10	5.42	5.18	4.98	8.21	1.21
SECTION 51	10.38	11.40	10.81	10.04	11.22	10.71	8.84	10.10	8.88	11.28	12.87	13.78	10.35	12.47	10.85	10.17	8.88	11.88	2.40
SECTION 52	8.51	8.13	7.98	8.81	7.54	8.48	8.15	7.00	4.58	5.88	8.88	11.38	8.48	8.84	7.54	5.75	8.87	8.81	2.84
SECTION 53	7.27	8.48	7.77	7.81	7.13	8.87	8.74	7.52	4.38	8.50	8.31	11.38	8.88	8.30	8.15	8.18	5.42	9.87	4.55
SECTION 54	5.44	6.52	5.81	5.83	5.74	4.58	4.74	4.88	4.38	5.44	5.72	7.04	4.88	7.27	5.88	4.88	5.87	8.13	2.28

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Source: <https://www.industrydocuments.ucsf.edu/docs/mnvy0004>

CHART E: SECTION 33 NIELSEN PANEL

19-Aug-92

Section 33

Total Sample: 76 retail outlets

Supermarkets +\$2MM:

Food Barn  
Hy-Vee  
Dillon's  
Nash-Finch  
Boogarrr's

Gas Convenience:

Sinclair  
  
Gas Mini:  
  
Amoco  
Texaco

Drug:

Reliable  
  
Mass Merch:  
  
Wal-Mart  
Target  
Pamida

Food Stores -\$2MM:

7-11  
Kwik-Shop

As per agreement

Note:

In order to protect the specific location/identity of our cooperators, only retailers with more than one store in Section 33 or who belong to larger organizations will be listed.

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## CHART F: ACCOUNT RESULTS

ACCOUNT	TRADECLASS	TOTAL CONSUMER SAVINGS	ACCOUNT CO-FUNDING \$/CTN	PRE	MARL. CPW* PROMQ	POST	INCREASE % PROMO vs. PRE
CLC	C-Gas	79¢/2 pk	\$1.45	58	67	51	16%
Casey's	C-Gas	37¢/1 pk	\$1.20	27	34	NA	26%
Qulk Trip	C-Gas	70¢/2 pk	\$1.00	119	175	NA	47%
SuperAmerica	C-Gas	94¢/2 pk	\$2.20	40	111	65	177%
Doris' Mkt-N-Gas	C-Gas Ctn Outlet	35¢/1 pk	\$1.00	57	91	NA	60%
J-N-T	Convenience	82¢/2 pk	\$1.60	51	70	59	37%
Oppy Amoco	C-Gas	70¢/2 pk	\$1.00	45	79	55	76%
Gartner Oil	C-Gas	70¢/2 pk	\$1.00	59	129	78	119%
Vivgo Foods	Grocery	70¢/2 pk	\$1.00	35	49	35	40%
Hy Vee	Supermarket	70¢/2 pk	\$1.00	139	319	145	130%
Stop & Go	C-Gas	35¢/1 pk	\$1.00	76	121	83	59%
Big Red Mini Mart	Convenience	35¢/1 pk	\$1.00	58	109	71	88%
Quik Pik	Convenience	35¢/1 pk	\$1.00	160	210	185	31%
Spencer Super Valu	Supermarket	70¢/2 pk	\$1.00	88	125	NA	42%
Pump & Pack	C-Gas	70¢/2 pk	\$1.00	40	65	45	62%
John's Quik Stop	Convenience	35¢/1 pk	\$1.00	100	160	115	60%
Jim's Foods	Convenience	35¢/1 pk	\$1.00	75	137	112	82%
Cargo Express	Convenience	70¢/2 pk	\$1.00	35	80	40	129%
Buchanan's Standard	Convenience	70¢/2 pk	\$1.00	41	55	NA	34%
Corning Mini Mart	C-Gas	35¢/1 pk	\$1.00	50	75	60	50%
D.C. Shell	C-Gas	70¢/2 pk	\$1.00	37	60	NA	62%
D.J's Mini Mart	Convenience	70¢/2 pk	\$1.00	55	80	NA	45%
The Pump	C-Gas	70¢/2 pk	\$1.00	62	100	NA	61%
Garfield Mini Mart	C-Gas	70¢/2 pk	\$1.00	54	113	52	109%
Belt Minit Mart	C-Gas	70¢/2 pk	\$1.00	39	82	45	110%

\*Data sourced from store order/shipment reports with the exception of Hy Vee Supermarkets, sourced from scanning files. Pre Promotion data includes at least four weeks of shipments. Post Promotion data includes 2-4 weeks of shipments.